AUTOMOTIVE MARKETING

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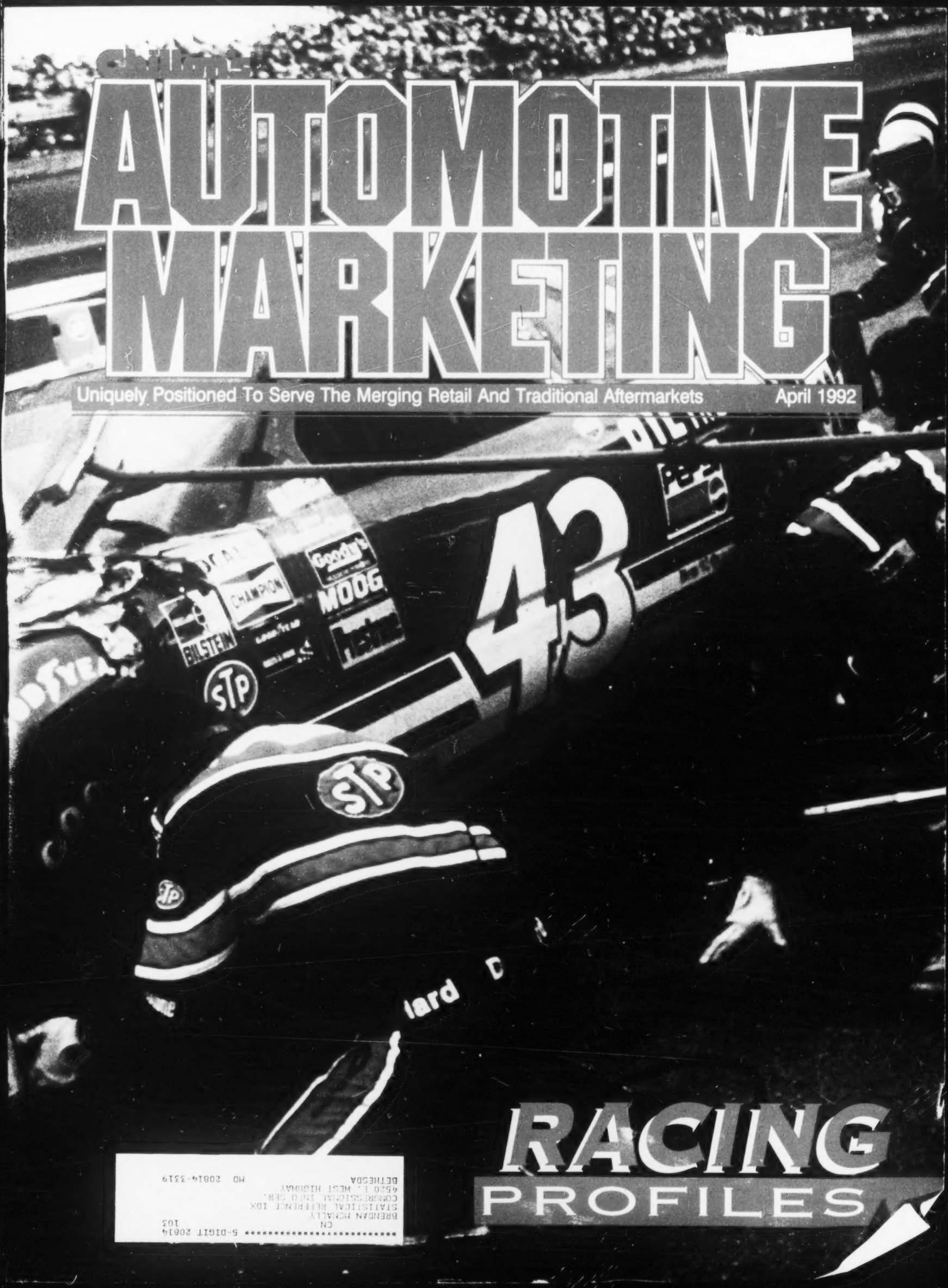
April 1992



RACING PROFILES

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AUTOMOTIVE MARKETING

APRIL ISSUE/VOLUME 21, NUMBER 4

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The Association of Automotive Aftermarket Distributors (AAAD) has 34 warehouse members, which in turn operate 87 distribution center locations.

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Racing sells products to fans; here's what major manufacturers are doing to use racing.

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Cover photo courtesy: Daytona International Speedway

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BPA

JESSE H. NEAL AWARD-WINNING PUBLICATION FIVE OUT OF EIGHT YEARS

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MARKET LINE

Appearance Chemical Strategy Made Simple: Gain Category Dominance Or Stake Out A Niche

When you talk about appearance chemicals you're speaking about a market with a myriad of products that sells roughly $640 million a year, according to Lindsey-Kaufman, Tenafly, NJ. The largest single category of appearance chemicals is protectants which amounts to some $255 million, followed by wax and polish which totals about $190 million. The rest of the category which includes a long list of other kinds of automotive appearance products such as bug and tar removers, general purpose cleaners, specialty cleaners for use on upholstery and car interior surfaces, car washes, and especially a new category of tire cleaners, all of which comes to some $195 million.

For a long time a discussion of the market for protectants meant a single phone call to Armor All Products, Aliso Viejo, CA, which was virtually the category all by itself. "We're celebrating 20 years of selling protectant," said Rick Manoogian, marketing manager for Armor All's protectant division. "And we continue to dominate the category with well over 80% of the market. Ninety million customers use it annually and we see a 98% satisfaction ratio. We still own the patent and we're still expanding internationally."

Although Manoogian conceded that both Turtle Wax (Chicago) and First Brands (Danbury, CT) have made serious runs at Armor All, neither have surpassed it. "We're still the category driver. We've had many competitors. In fact, we have a cabinet on display in our office with over 150 bottles from competitors."

Naturally we asked, how do you stay number one? "It starts with a product that works. We have tremendous word of mouth. And, we've spent some $75 million in advertising over the past ten years. There's no substitute for strong advertising: We've supported the product year in and year out, and we get a lot of samples out year after year."

At Turtle Wax, Chuck Tornabene said its Clear Guard protectant does well. "As we get people to try it we get a good repeat rate." However, "we're not supporting that brand, we have other priorities."

But at First Brands, the talk is more upbeat. "We're working on STP Son Of A Gun," said Mark Haglund, vice president/director of marketing. "Anytime anyone owns all the business there's always room for a strong number two. The market's still over $200 million with some pretty solid growth, so there's room. Our figures show we have 27% of the market measured in ounces. Armor All is still far and away number one. Turtle Wax made a run but they're not a factor anymore."

However, going after Armor All is tough, Haglund conceded. The right strategy is paramount: "Armor All is a good product. Consumers like it. Our tack is not to say we're better but instead offer a value alternative with the same performance. The performance of the two products is virtually identical. We make no claim to be better, but equal, and offer a lesser price. Son Of A Gun is about 20% under the everyday price and always better in the ads. We're going to advertise like number one and price under them."

Between them, Armor All and First Brands will spend some $4-5 million advertising protectants this year. "It's an expensive game," Haglund said, but, he added, it has its virtues. "Spending that much money keeps other people out of the market."

Not quite. 303 Products Inc., Redding, CA, while admittedly commanding a small share of market, nevertheless is expanding about 30-40% a year, according to CEO/president Dennis A. Praegitzer. The company manufactures a high-end protectant, wiper treatment, and instant windshield washer tablets that dissolve in the washer reservoir. "We're not after Armor-All customers," said Praegitzer. "Our customer is the one who comes into the store and walks out *without* Armor All or STP. We position ourselves as having the product for the person who knows the difference."

The second major appearance chemical category is wax and polish. While the category is not nearly so dominated by one company, the field does seem to be narrowing down slightly. Four companies: Turtle Wax; Reed Union (which markets Nu Finish), Chicago; Armor All; and First Brands control some 80-85% of the market.

At Turtle Wax, Chuck Tornabene, president, consumer products, said, "We had an extremely good year in 1991. We finished close to 40% of the market according to the Nielsen numbers. And, we're starting strong exceeding last year. We introduced Finish 2001 car polish and most retailers are getting behind it with features and end caps. Best of all, it hasn't impacted our Hard Shell wax which still gets 25% of the market." Tornabene has felt for some time that some smaller brands are going to drop out of the wax market. "When you get below 10% market share you raise the question in the trade: Do we need the brand on the shelves? We're spending an all-time high this year. We continue to support our brand."

Tornabene traced some of Turtle Wax's history back to Ben Hirsch in the 1940s. Turtle Wax has been on top of the wax market for a long long time despite strong challenges from Armor All and Nu Finish in recent years. Tornabene said Turtle Wax has a simple formula for success: "We continue to support the brand with ads. We continue to update the look. This year there's a new label. Last year we had a brand new bottle. We continue to reformulate Hard Shell to be state of the art. It's easy to apply and remove. It's safe and compat-

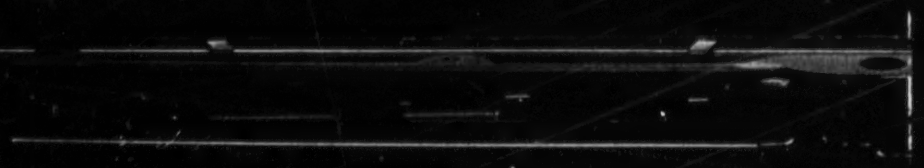
APPEARANCE CHEMICAL MARKET

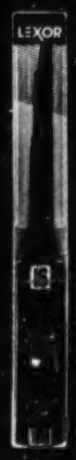
This is a $655 million market in retail sales. Vinyl protectants and cleaners are still the largest segment of the market at some $255 million. The Wax and Polish segment, now at $190 million, should increase in dollar sales because of renewed emphasis on high end $15-$20 waxes and polishes. And, the new increased competition and awareness of tire cleaners should spark the $195 million other appearance

Segment	Size (Millions)	Comment
Protectants	$255	Continued steady growth
Wax/Polish	$190	High End wax sales mean more dollars
Other chemicals	$195	Tire cleaners good for market

Source: Lindsey-Kaufman

IT PERFORMS ON THE SHELF





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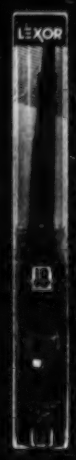

MARKET LINE

ible with the car's finish. Absolutely, I see it sticking around for another ten years. I don't believe in life cycles."

Paul Jones, marketing manager for Armor All's wax division, conceded Rain Dance had declined. "It's not where it was. We took a high road and made no unsubstantiated claims. Some of the formulations available have moved on and Rain Dance has not changed with the times. It's perceived as hard to use and we've lost some of the customer base. Hopefully, we rectified the situation. We've developed Rain Dance Advanced Formula that combines durability and ease of use. It's more durable, and, even more significant to the consumer, easier to buff off. It's a line extension, not a replacement. The original Rain Dance is still available."

Since the wax and polish market is basically flat in units with roughly half of all vehicle maintainers waxing cars, a figure that has stayed static for many years now, no one seems ready to go with an extensive program in waxes this year. Instead, there's a lot of nibbling around the edges and niche marketing. Here are a few we've looked at.

At Liquid Glass, Teaneck, NJ, senior vice president Laura Heywang said their $19.95 polish "gives us a certain portion of the market. Once people use it they will not switch back to low end waxes. A lot of high end detailers use it. The price is not a deterrent. We've been around since 1983 and found our niche and we're going to stay with it."

Dan Hirning, president of Better Ideas Inc., Vista, CA, sees a wiser wax consumer going back to the basics of quality and value in a product. Hirning also feels that the impact of products advertised and marketed on TV is declining, a good sign for *AM* readers. And, awareness of car washes and clear coat friendly product are rising. "Owners with 60-72 month financing want to keep up that investment with car care maintenance," according to Hirning.

Pat Cirelli, vice president and general manager at Mothers Polish Co., Huntington Beach, CA, forecasts a good year. He sees manufacturers working more closely with retailers to avoid the overstocking that's been a problem in the past—on-time stocking, if you will. Cirelli looks forward to a soon-to-break advertising program for the Mothers Clear Image Series, a group of products for clear coat care. Today's DIYer is now looking for clear coat products.

President Larry Kerin of Meguiar's, Irvine, CA, said a growing proportion of wax users simply want the best available. "The car is a major investment and people are keeping them longer. New paints present problems with swirls and scratches. People need a wax to meet those needs and get rid of scratches and swirls." Meguiar's is introducing Medallion All Paint Wax at $19.95 aimed at the heavy user segment of the market that produces 35-40% of wax and polish sales.

Not quite as high priced but still in the $9-$10 range is Prism, First Brands' new entrant, which abandons the Simoniz brand name. "It's a spray away wax," Haglund said. "Apply, let it dry, and spray it away with the hose. We see the trends. Spare time is at a premium, people are falling off the DIY wagon. Prism holds them in the market. We plan to spend as much behind Prism as Son Of A Gun."

While many companies seek more sales through line extensions and higher priced products, Brothers Research, Burlington, NC, has prospered by limiting its line to jobbers and WDs. The 22 SKU Duragloss line, anchored by its polish, is a non-discounted line that DIYers can only buy at a jobber store. William and Jerry Bailey are chemists and self-described car nuts who developed the polish in 1975. "We've rejected orders from retailers," president William Bailey told us.

While the wax and polish category may grow slightly in dollars, it's basically a slow growth category. Much faster growth can be expected from car washes that are gradually replacing household cleansers. Armor All's Paul Jones thinks car washes will be close to $50 million this year and the potential sales are huge. "About six out of ten car washers still use dishwashing soap or something like it. A car wash specific product is astronomically better for the car's finish than dishwashing soap."

Mary McNally, public relations manager for Meguiar's, agreed, "Don't use dishwashing liquids. They're designed to remove grease. They remove the wax and polish and will strip away the protective layer on the paint. Cars are bombarded by so many detrimental things that it's vitally important to maintain a protective barrier on the paint."

A newcomer to the car wash field is Wonder

LIKE IT DOES ON THE HIGHWAY.

bushings; and quick-mount adaptors specifically designed to fit both domestic and import vehicles.

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MARKET LINE

Wash from Gold Eagle, Chicago, a product that requires no water. "It's a spray-on product," said director of marketing Gerry Smith. "Rub it off with a damp sponge and it's done. It's for apartment dwellers and places with a ban on washing cars, and for people who just want a convenient job. You don't have to get out sponges and fill a bucket and unwind the hose."

Smith talked about the strategies for a small company that doesn't offer a complete line of appearance chemicals. "Our basic strategy is to introduce a new, innovative product every year. At least one, preferably two or three. We can't spend millions to establish our brand with advertising so we have to be at the forefront of technology. We can't be afraid to come out early and help establish a category. We have to be in tune with the needs of the market. Our core business is in maintenance and functional chemicals. Appearance chemicals are a new venture for us. We're not selling waxes, for instance. Wax is subjective: brand names influence opinions. We want to keep where people can see or feel the difference; we want to be performance oriented."

A prime example of a small company establishing a category is the way No Touch North America, Irvine, CA, has established tire cleaners as an important new segment of appearance chemicals. "We've only been around for a year, since February, 1991, but a lot of people think we've been around for much longer," said Jeff Sherman, executive vice president/general manager. "The category of tire care was neglected and a lot larger than people think. We estimate it at $100 million."

No Touch spent some $4 million and delivered a million samples to build brand awareness for the category. "We think after year one we're at 10% of the market. And that's coming from nothing. In tire care, as opposed to all purpose products, we're number one. I'm very satisfied and Taiho (the company's Japanese parent company) is very satisfied. It's given us the confidence to go with a bigger ad budget next year. We have competitors like Armor All, STP, Turtle Wax, Westley's all similarly positioning themselves. Three large companies with me-too products helps build our credibility and builds awareness for the No Touch type product."

Both Armor All and First Brands, along with many other chemical makers and marketers, obviously feel that tire care products have a future. "The potential may be there," First Brand's Haglund said. "but everybody is new in this business now and we'll start tracking it. In a year or so we will have a firm number." Still, both concede that No Touch did a fine job of opening the category, but feel that the brand awareness of Armor All and STP foam cleaners will win out in the end.

While the foam products have attracted the most attention, Jerry Smith, vice president of marketing at the Westley Division of Blue Coral, Cleveland, OH, said Westley's Blech Wite tire cleaner remains the number one tire care product. "It's been a mainstay in planograms for 40 years," Smith noted. "We did see a decline in 1989 because of the decline in whitewall tires but we repositioned it. It *was* developed for whitewalls but it cleans anything rubber. So we relabeled it as tire cleaner, blackwall or whitewall. We also added a 25% more product bonus and made sure retailers knew it was a cleaner. Now it's regained its momentum."

Smith believes the tire care market is about $20 million. "It's a growth category because No Touch came in and made it a category. The same thing happened in the 1970s when Armor All came out with its protectant: they focused on the product as a protectant. No Touch created the category by spending money. It's growing, but not as quickly as No Touch might think. That's why we're not going big on ads for Just For Tires (Westley's foam cleaner). We never pushed it that hard."

Still, the success of No Touch has led other smaller companies to join the market, creating sub-niches in the niche market. For example, Randy Fowler, national sales manager for X Labs, Wheeling, IL, said, "We looked at the market, the emergence of No Touch and the amount of national advertising being done, and we thought there was a need for a price alternative. The national brands are at $2.99 or so and we're at $1.99. At retail, there are price points you have to hit: a national brand, a price brand, and maybe a private label."

While X Labs goes for price, Cyclo Automotive Products, Lake Park, FL, is going for a better product, according to president Gary Ouellette. "We try to be different and better. We don't like any of the products we've seen.

MARKET LINE

We feel the tire should be throughly cleaned rather than mask the dirt. There's a certain amount of dirt hidden by a dark and shiny tire. Our foam can actually lift dirt out of the tire.

"But all the advertising is good for awareness," Ouellette said. "It's churned things up. It brings people to the shelves and creates some excitement. Then people can make their own decision."

And that's what auto stores will see as the weather warms: consumers coming to the shelves for appearance chemicals of all kinds, making their own decisions. ■

At Last A Really Big Show: APAA Joins AAIW Fold

For years, the majority of our members, exhibitors, reps and buyers alike, asked for industry unification on the trade show front," said APAA chairman Alfred Gaspar (McKay Chemical/Blue Coral). "We are most pleased to respond to our members' needs."

Following a March meeting, the Automotive Parts & Accessories Association (APAA), Bethesda, MD, voted to hold its 1992 trade show in Las Vegas November 3-6 at the same time as the other major aftermarket associations as part of the Automotive Aftermarket Industry Week (AAIW). Other associations involved in the week-long series of activities, starting November 1, are Auto International Association (AIA), Diamond Bar, CA; Automotive Service Industry Association (ASIA), Chicago; Motor and Equipment Manufacturers Association (MEMA), Englewood Cliffs, NJ; and Specialty Equipment Market Association (SEMA), Diamond Bar, CA.

"The addition of the APAA Show to AAIW completes the circle in the industry's long effort to produce a true all-industry event," said MEMA president Robert Miller. "AAIW 1992 is now an event equal to any automotive parts, equipment, chemical and accessory show staged anywhere in the world."

The APAA show will combine with the Big "I" Show co-sponsored by ASIA and MEMA at the new Sands Expo and Convention Center. The SEMA/AI Show will be held as usual in the Las Vegas Convention Center. One badge will admit attendees to both shows. "The distinction of the United States as the indisputable world leader in automotive technology, innovative developments and sheer scope will be featured in Las Vegas," said SEMA president Chuck Blum.

The AAIW Show Committee estimates that 30,000 buyers and 2,500 exhibitors will participate. With the addition of APAA, total attendance could reach 65,000. The Committee estimates that there will be 6,500 booths covering 650,000 square feet at the Sands and Convention Centers. "Buyers will be able to see the most comprehensive array of vehicle products anywhere," said ASIA president Dave Roland, "and education prior to and during the show will allow attendees to explore new concepts to help their businesses grow and prosper. It is truly a 'must attend' event."

While final planning for the massive Las Vegas event continues, we should remind our readers that APAA's previously announced Chicago Consumer Automotive Products & Services Exposition, a show for consumers, will still be held in Chicago's McCormick Place West (Donnelley Hall), October 2-4.

Decisions about trade shows in 1993 and beyond are still being discussed by the various aftermarket organizations. ■

Quick Lube Market Mature, Retail Financials Good

Valvoline Instant Oil Change, Lexington, KY, recently opened its 300th service center. President Bob Harbison noted that the Valvoline operation had gone from 42 to 300 service centers in just five years. Valvoline owns about 270 of the centers and franchises the remainder.

Harbison might have been speaking for the

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RACING PROFILES

Get your store into the excitement of motorsports with racing tie-ins and promotions.

by **Steve Davis,**
Editor

Auto racing attendance continues to grow in the face of what many experts have classified as a sluggish economy," said Leo Mehl, director of worldwide racing for Goodyear Tire & Rubber Co., Akron, OH. "Despite a nationwide belt-tightening, it's tough to downplay the commercial value of auto racing when attendance continues to increase and the television industry continues to expand its motorsports programming."

Aftermarket suppliers—brands and logos you handle in your store every day such as AC-Delco, Valvoline, Motorcraft, STP, Octane Boost, Exxon, Bosch, and Zerex—have supported motorsports for many years. Virtually every form of car and truck racing carries the flags of aftermarket backers and contingency sponsors on the flanks of its competitors. Racing provides high visibility for sponsors. Com-

Photo courtesy: Daytona International Speedway

1990-91 MAJOR AUTO RACING SERIES ATTENDANCE COMPARISON[1]

Sanctioning Body And Car Type	Race Dates 1991	Total Attendance 1991[2]	Average Attendance 1991[2]	Race Dates 1990	Total Attendance 1990[2]	Average Attendance 1989[2]	Attendance Gain/Loss 1991-90[2]
NASCAR Winston Cup Stock Cars	29	3,377,050	116,450	29	3,336,675	115,058	+ 40,375
CART Indy Cars & USAC Indy 500	17	2,806,801	165,106	16	2,616,115	163,507	+190,686
NHRA Drag Cars	18	1,547,900	85,994	19	1,535,575	80,820	+ 12,325
WOO Sprint Cars	73	1,297,650	17,776	66	1,171,100	17,743	+126,550
SCCA Trans-Am Cars	14	1,013,645	72,403	15	1,128,475	75,232	-114,830
NASCAR Grand National Stock Cars	31	938,450	30,273	31	913,800	29,477	+ 24,650
IMSA GT Prototype Cars	14	760,500	54,321	15	855,200	57,013	- 94,700
IMSA GTO/GTU Cars[4]	15[4]	611,420	40,761	14[4]	779,750	55,696	-168,300
ASA Stock Cars	20	502,017	26,421	17	330,106	19,418	+171,911
ARCA Stock Cars	20	440,300	22,105	18	351,650	19,536	+ 88,650
MTEG Stadium Off-Road Vehicles	10	347,950	34,795	10	386,826	38,683	- 38,876
ACT Stock Cars	21	328,562	15,645	23	345,925	15,050	- 17,363
NASCAR Winston West Stock Cars	8	308,500	34,278	9	261,000	29,000	+ 47,500
IHRA Drag Cars	7	307,734	43,962	8	309,628	38,704	- 1,894
NASCAR Modified Stock Cars	23	282,600	12,287	23	270,900	11,778	+ 11,700
North American Totals[3]	**272**	**12,496,094**	**45,942**	**268**	**12,046,193**	**44,948**	**+449,901**

[1] Figures compiled from Goodyear Racing Division race reports and official sanctioning body statistics.
[2] Total event attendance including practice and qualifying days.
[3] Attendance and dates for multi-race events counted only once in totals.
[4] GTO/GTU is a support srles for IMSA Camel GT.

ACT = American/Canadian Tour
ARCA = American Racing Club of America
ASA = American Speed Association
CART = Championship Auto Racing Teams
IHRA = International Hot Rod Association
IMSA = International Motor Sports Association
MTEG = Mickey Thompson Entertainment Group
NASCAR = National Association for Stock Car Auto Racing
NHRA = National Hot Rod Association
SCCA = Sports Car Club of America
USAC = United States Auto Club
WOO = World of Outlaws

petition is a real life testbed for their products, and it also builds enthusiasm throughout their companies.

Motorsport's Massive Appeal

You can't beat motorsports for their vast exposure of products, corporate identity, and retailer or jobber names. Sponsorship of a car or team, sponsorship of an event, and contingency awards are all ways—from large investment to small—to get involved in racing. For race sponsorship, look no further than the National Association for Stock Car Auto Racing (NASCAR) where events such as the Daytona 500 by STP, Goodwrench 500, Motorcraft Quality Parts 500, Champion Spark Plug 500, AC-Delco 500, and Pyroil 500 provide priceless visibility for these companies and products.

Goodyear's annual check on 15 professional racing series showed an overall increase of 449,901 or 3.7% over 1990. A record total of 12,496,094 spectators attended 272 events in 1991, up from 12,046,193 for 268 events in 1990. Average event attendance rose 2.2% to 45,942 from 44,948 in 1990. These are pleasantly positive numbers for a less than stellar economic year.

The advertising industry estimates the annual television viewing audience for motorsports at about 250 million. Television, led by ESPN, has increased both live and taped racing coverage. From 92 races in 1986, the total number of events has jumped to 248 in 1991. ESPN isn't alone; TNN came on board in 1991 with 22 race telecasts and plans to bump that up to 37 this year. And, some of those events will be first-ever live broadcasts of major drag races.

The major networks—ABC, CBS, and NBC—carry selected races while super station WTBS, SportsChannel America, and Univision have also expanded their racing coverage. On top of that over a dozen auto racing shows are on the tube each week. "In this decade," said Mehl, "it will be difficult to match the explosive growth auto racing experienced during the '80s. The simple fact is that most race tracks now are operating at near-capacity.

"Tracks are seeking more help from state and local law enforcement agencies to handle the swelling volume of race traffic." Mehl explained. "Business plans routinely include major capital improvement budgets to build new grandstands and hospitality suites, expand parking areas, and improve public amenities. It's the price you pay for success," he added.

For the aftermarket, the most interesting aspect of motorsports is that the demographic and pyschographic profiles of all those racing fans matches up with that of your retail customer—the DIYer. Our *Consumer Automotive Repair Study (CARS)* findings show that the prime DIY age group is 25-34 years old, followed by the 35-44 year old group. DIYers are also primarily male. These demographics are a virtual match with those assembled by major race sanctioning organizations—racing fans are younger males with low-to-mid-range household incomes who are responsible for the maintenance of one or more vehicles.

What Racing Can Do For You

What exactly can racing bring to an aftermarket product and automotive parts store? The many benefits include:

- The enthusiasm that racegoers have for their sport rubs off on the parts and products used in racing. When you stock those parts that have racing images, this enthusiasm and interest carries over into your store.
- Race tracks are also proving grounds for automotive parts and products. Hard parts and vital fluids that survive the heat, pressure, and speeds of motorsports have proven themselves. The spectator perception is that if they're good enough for a Mario Andretti or Don Garlits, surely they'll do fine in my street car.
- Brand names are important to our business. Racing builds recognition of brands. The visibility supplied by racing and racing-related promotion is incalculable.
- Racing builds store traffic. Race promotions can bring in customers before and after events.

Stores can get involved in racing in several ways:

- Participate in supplier race promotions. Read the Racing Profiles in this issue to see which manufacturers back auto racing. These companies run racing-related contests and promotions, offer race apparel, and can supply everything you need to get your store race ready.
- Sponsoring a car or team may be too rich for your blood, but you can be a partial sponsor or offer discounts to those racers who carry your store identification.
- TV/radio, race program, and trackside advertising are not expensive and provide excellent visibility for your business.

Getting Into The Race

Putting your store into the race is relatively easy and doesn't cost much at all. The idea is to wrap your business in the excitement that racing generates. The following are some easy ways to get involved:

- Feature those products your suppliers promote through racing. Display them prominently. Make use of available merchandising such as window posters, special displays, flags, and banners.
- Advertise your store at the racetrack. You might even look into setting up a mini-store at the event.
- Race clothing, or wearables as they've become known, are very popular. Dress your store personnel up with caps and shirts during racing season. These are also excellent items to sell.

Get involved with racing; it's exciting for your customers and employees alike. ■